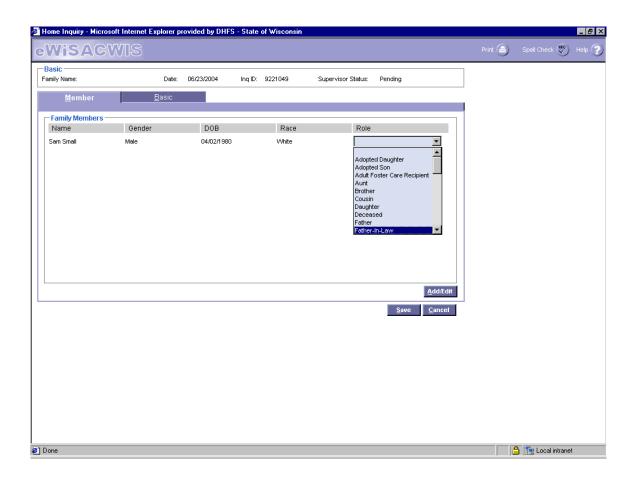
Establishing A Home Inquiry

- 1. From the desktop, go up to Create > Provider > Home Inquiry.
- 2. The Search window will open. Search out the individuals who are subjects of the Home Inquiry. Once completed, click Continue to open up the Home Inquiry Window Members page.
- 3. The Family Name in the Basic Box will be blank until the Roles have been defined. The Date, ID number and Supervisor Status will pre-fill.
- 4. The Family Members box will pre-fill with the individuals that were searched out at the beginning of the Inquiry. To the right of each individual is a field titled Role. Each member must have an associated role. Select the appropriate value from the drop down list. * One family member must have the role of Parent 1. This is generally the female head of household. Once that all roles have been defined, click onto the Basic page.



- 5. The Home Information box will pre-fill with Parent 1 demographics and Parent 2 demographics if applicable. Marital Status, Language, and County are all drop down values. Select the value that best describes Parent 1.
- 6. The Inquiry Information Box will need information completed. The Parent Agency is the agency this individual may be associated with. For example, if Parent 1 was licensed by a private agency, use the Search hyperlink to search out the agency and have the agency pre-fill under the Parent Agency name. The Inquiry Type, Primary Referral Source and Secondary Referral Source have drop down values. Select the appropriate value for the inquiry. The description field is an optional free flow text field.
- 7. The Worker/Committee box allows a Screen In/Out decision by someone without supervisory approval. A supervisor will need to do a final screening decision. The reason box becomes enabled with drop down values only if the Inquiry was screened out.
- 8. The Supervisor/Committee box will allow a final screening decision. The reason box becomes enabled with drop down values only if the Inquiry was screened out.
- 9. The Options Drop Down field contains various text letters and checklists. Click Save and Close. If Screened In, the Home Inquiry will appear on the Providers Expando. If Screened Out, the Inquiry will disappear.

